

## Level 2 Outlook

### Introducing Outlook

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#### Explore the Outlook modules

This section covers items like:

- The different elements of the Outlook program window
- The different modules that make up Outlook

#### Use the Navigation Pane

This section covers items like:

- Changing the size of the Navigation Pane
- Minimising and expand the Navigation Pane

#### Use the To-Do Bar

This section covers items like:

- Minimising and expand the To-Do Bar
- Changing what the To-Do Bar shows
- Hiding the To-Do Bar

#### Create an email

This section covers items like:

- Creating a new email message
- Adding recipients and a subject to an email
- Sending an email

#### View and read emails

This section covers items like:

- Opening an email to read it
- Turning the Reading Pane on and off
- Using AutoPreview

#### Respond to emails

This section covers items like:

- Replying to an email
- Forwarding an email
- Resending an email

## **Categorise items**

This section covers items like:

- Categorising items
- Editing categories or create new ones
- Using Quick Click

## **Flag an email**

This section covers items like:

- Flagging an email
- Setting a start date, due date and a reminder when flagging an email
- Marking flagged emails as complete
- Clearing flags from emails

## **Writing and sending emails**

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### **Write and save drafts**

This section covers items like:

- Working with drafts of emails

### **Change message formats**

This section covers items like:

- The different message formats: HTML, plain text and rich text
- How to change from one format to another
- How to set a default format for new emails

### **Apply themes and stationery**

This section covers items like:

- The difference between stationery and themes
- How to apply a theme to an individual message
- How to set a theme or stationery as a default for all new messages

### **Set default message fonts**

This section covers items like:

- Setting default fonts for outgoing messages
- Changing the font used for viewing plain text messages

## **Mark how important an email is**

This section covers items like:

- Marking an email as having high or low importance
- Recognising such emails at a glance in your inbox

## **Mark how sensitive an email is**

This section covers items like:

- How to mark an email as sensitive
- The limitations of sensitivity markers

## **Set delivery options**

This section covers items like:

- Directing replies to an email to another address
- Delaying delivery of a message so it sends on a specific day or at a specific time

## **Request delivery or read receipts**

This section covers items like:

- Requesting receipts to confirm that an email has been delivered or read
- Spotting receipts in your inbox
- Using the tracking page of an email to see a log of receipt activity

## **Use voting buttons**

This section covers items like:

- Adding voting buttons to an email to conduct a poll
- Using the Tracking page to see poll results

## **Add a signature**

This section covers items like:

- Creating and edit signatures
- Adding a signature to an individual email
- Automatically add a particular signature to different types of responses, such as replies or forwards

## Managing emails

### Work with attachments

This section covers items like:

- Attaching a file to an email
- Spotting emails with attachments in your inbox
- Previewing an attachment to an email
- Opening or save an attachment

### Sort emails

This section covers items like:

- Changing how messages are arranged in a folder
- Sorting messages in ascending or descending order
- Changing which columns are displayed in a folder

### Work with Conversations

This section covers items like:

- View mail folder items as conversations
- Ignoring conversations

### Search emails

This section covers items like:

- Searching emails using the Instant Search box
- Using the Query Builder for more complex searches

### Use the People Pane

This section covers items like:

- Accessing and use the people pane

### Work with folders

This section covers items like:

- Creating a new folder
- Moving emails from one folder to another
- Adding folders to the Favourite Folders area

### Archive emails

This section covers items like:

- Archiving messages
- Setting up messages to be archived automatically

## **Use search folders**

This section covers items like:

Setting up search folders

## **Set up rules for emails**

This section covers items like:

Setting rules to carry out tasks automatically on incoming and outgoing emails

Modifying and delete rules

## **Deal with junk email**

This section covers items like:

Setting up Outlook's filter to move junk email straight to the Junk E-Mail folder and not the inbox

Adding email addresses to safe and blocked senders lists

Letting Outlook know when it has got it wrong and marked email as junk when it shouldn't have

## **Clean up the mailbox**

This section covers items like:

Emptying the deleted items folder automatically when closing Outlook

Using Mailbox Cleanup to find and remove old or large emails

## **Set up an out of office reply**

This section covers items like:

Using the Out of Office Assistant to send replies while you are away

Setting up rules for the Out of Office Assistant to follow while you are away

## **Set security options**

This section covers items like:

Using Outlook's Trust Center to set security options for emails, such as preventing images and HTML from being displayed

## **Work with data files**

This section covers items like:

What data files are and how they are used

How to create a data file

How to add and remove data files

## Using the Calendar

### Looking at the calendar module

This section covers items like:

- The different parts that make up the calendar module
- How to change the view of your calendar from day to week to month
- How to jump to a particular date in the calendar
- The difference between appointments, events and meetings

### Create an appointment

This section covers items like:

- Creating an appointment
- Adding further details using the appointment window
- Setting an appointment to repeat on a regular schedule

### Create an appointment from an email

This section covers items like:

- Creating an appointment from an email

### Add an event

This section covers items like:

- Adding an event to your calendar
- Changing how the event is marked

### Request a meeting

This section covers items like:

- Requesting a meeting
- Replying to a meeting request
- Tracking responses to a meeting request

### Use the Scheduling Assistant

This section covers items like:

- Using the Scheduling Assistant to find the best time for a meeting

### Make changes to a meeting

This section covers items like:

- Updating meeting attendees
- Changing the meeting time
- Proposing a new meeting time

## **Set calendar options**

This section covers items like:

- Defining your working week
- Defining your working day
- Adding a second time zone
- Adding holidays

## **Create and use multiple calendars**

This section covers items like:

- Creating a new calendar
- Displaying more than one calendar at the same time
- Copying items between calendars

## **Share your calendar with a colleague**

This section covers items like:

- Sharing your calendar with a colleague in the same organisation
- Managing sharing permissions to control what your colleagues can see

## **Share your calendar with somebody outside the organisation**

This section covers items like:

- Sharing your calendar by email
- Publishing your calendar to the web

## **Working with Contacts**

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### **Looking at the contacts module**

This section covers items like:

- How Outlook stores contact information
- How to view your contacts in different ways
- How to open a contact to see and edit more information
- How to find and search your contacts

### **Create a new contact**

This section covers items like:

- Creating a new contact
- Creating a new contact from the same company

## **Create a new contact from an email**

This section covers items like:

- Creating a contact from a message header
- Creating a contact from an electronic business card

## **Use contacts folders**

This section covers items like:

- Creating a new contacts folder
- Adding a contact to the folder
- Sharing a contacts folder

## **Use electronic business cards**

This section covers items like:

- Creating a business card for yourself
- Changing a business card's design
- Inserting a business card into an email

## **Create a contact group**

This section covers items like:

- Setting up a distribution list
- Adding and remove list members
- Merging distribution lists

## **Use a contact group**

This section covers items like:

- Sending an email or request a meeting with distribution list members

## **Using Tasks**

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### **View tasks and to-do items**

This section covers items like:

- The difference between tasks and to-do items
- How to view tasks and to-do items in the Tasks module
- How to see tasks and to-do items in other places in Outlook

### **Create a task**

This section covers items like:

- Creating a task using the toolbar
- Creating a task from an email



## **Record progress on a task**

This section covers items like:

- Recording progress on a task
- Changing a task's status
- Updating a task's notes and record secondary information
- Marking a task as complete

## **Manage tasks with folders**

This section covers items like:

- Setting up a new folder for tasks
- Moving or copy a task from one folder to another
- Sharing a tasks folder with a colleague

## **Assign a task to somebody else**

This section covers items like:

- Delegating a task to another Outlook user
- Accepting or decline a task that has been assigned to you

## **Provide updates on a task**

This section covers items like:

- Sending status reports on tasks

## **Using Notes and the Journal**

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### **Create a note**

This section covers items like:

- Opening the Notes module
- Creating a note

### **Manage notes**

This section covers items like:

- Viewing notes in different ways
- Categorising notes

### **Use Outlook's Journal**

This section covers items like:

- Opening the Journal module
- Configuring Journal tracking options
- Adding a Journal item manually